

Storyboard

Private Provider Monthly Summary entries and ICD- 10 codes

This storyboard demonstrates how to enter a Monthly Summary and document ICD-10 codes. Monthly Summaries show up in Case Recordings only when marked 'Completed.'

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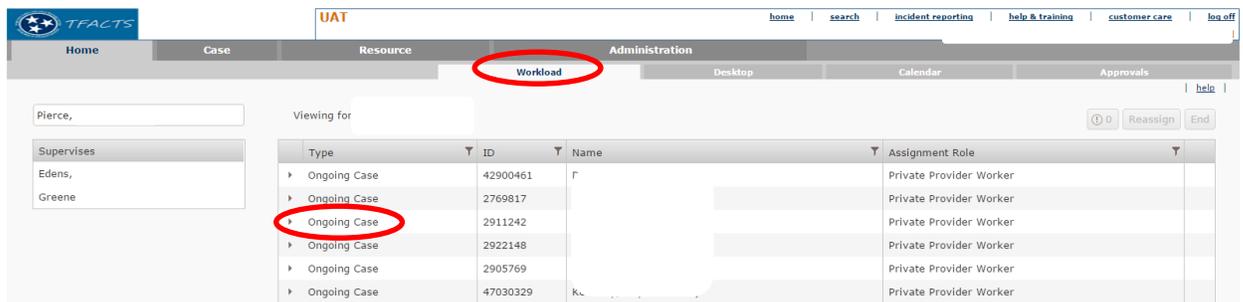
Multiple ways to access Monthly Summary

There are multiple ways to access the Monthly Summary for a child / youth. You can access it by

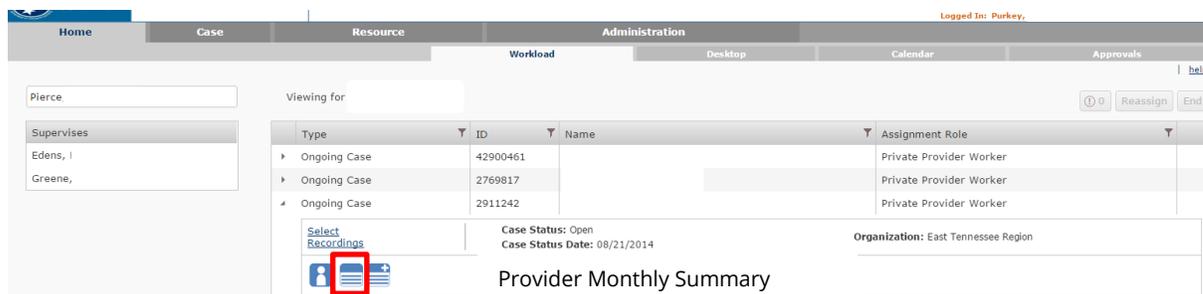
- Your Workload page, or
- By bringing another worker’s Workload page into focus

Workload access

- From the Workload page, expand the Ongoing Case for child / youth whose Monthly Summary you want to access



- There are icons available to select within the expanded Ongoing Case information. If you hover over the icon highlighted below, a “Provider Monthly Summary” pop up label is visible. If previous Summaries have been entered, you can access and read them via this icon.



- If you hover over the icon with a +, the “Add Provider Monthly Summary” pop up label is visible. Click on the icon.

The screenshot shows a navigation menu at the top with 'Home', 'Case', 'Resource', and 'Administration'. Under 'Administration', there are sub-menus for 'Workload', 'Desktop', and 'Calendar'. The main content area shows 'Viewing for Pierce,' followed by a table of cases:

Type	ID	Name	Assignment Role
▶ Ongoing Case	42900461		Private Provider Worker
▶ Ongoing Case	2769817		Private Provider Worker
▶ Ongoing Case	2911242		Private Provider Worker
▶ Ongoing Case	2922148		Private Provider Worker

Below the table, there are links for 'Select Recordings' and 'Add Provider Monthly Summary'. A red box highlights a plus sign icon next to the 'Add Provider Monthly Summary' link.

- You are automatically directed to the Add Monthly Summary page.

The 'Add Monthly Summary' form contains the following fields and controls:

- Provider Name:** [Text field]
- Child Name:** [Text field]
- Placements/Services:** Level 2 Continuum / Level 2 Continuum
- Service Period Month*:** [Dropdown menu]
- Service Period Year*:** [Dropdown menu]
- ICD Code*:** [Text field] with a **Search** button.
- ICD Description:** [Text field]
- Narrative:** [Large text area]
- Spell Check** and **Clear** buttons.
- Status:** Draft [Dropdown menu]

At the bottom of the form are **Apply**, **Save**, and **Cancel** buttons.

- Service Period Month* - this is a required field. Choose the month from the dropdown
- Service Period Year* - this is a required field. Choose the Year from dropdown
- To select an ICD 10 code, click the Search button.
 - Searching for an ICD-10 code can be accomplished by typing as little as “F” or “B”
 - You can do a keyword search in the ‘description’ field as well
- Identify the code you want to select
- Click on the line. It will be highlighted in Orange
- Click **Choose** to select the code

ICD Search Criteria

ICD Code:

ICD Description:

ICD Search Results

ICD Code ▲	ICD Description ▼
F11120	Opioid abuse with intoxication, uncomplicated
F11121	Opioid abuse with intoxication delirium
F11122	Opioid abuse with intoxication with perceptual disturbance
F11129	Opioid abuse with intoxication, unspecified
F1114	Opioid abuse with opioid-induced mood disorder
F11150	Opioid abuse with opioid-induced psychotic disorder with delusions
F11151	Opioid abuse with opioid-induced psychotic disorder with hallucinations
F11159	Opioid abuse with opioid-induced psychotic disorder, unspecified
F11181	Opioid abuse with opioid-induced sexual dysfunction
F11182	Opioid abuse with opioid-induced sleep disorder

71 - 80 of 500 Items

The screen below displays a 'Completed' Monthly Summary entry.

Note: *The Status cannot be 'Completed' unless the Narrative field is populated.

Home > Workload

Work Item

Work Item ID: 64810215 Work Item Type: Placement Start Date: 01/09/2015 End Date:

Add Monthly Summary

Provider Name: Placements/Services: Level 2 Continuum / Level 2 Continuum

Child Name:

Service Period Month: Service Period Year:

ICD Code:

ICD Description: Opioid abuse with opioid-induced psychotic disorder with delusions

Narrative:

Status:

- **Status:** Chose 'Completed' if the Monthly Summary entry is completed.
- Click **Apply** to remain on the Add Monthly Summary page to review your entry, OR
- Click **Save**, which will navigate you back to your Workload page.

Four Statures' of Monthly Summaries

There are 4 statures for a Monthly Summary.

- Draft
- Completed
- Created in Error
- Narrative Needed

‘Draft’ Status

The screen shot below displays a Monthly Summary entry that is in ‘Draft Status’. The fields listed below are required fields and must be entered to save a Monthly Summary.

- **Service Period Month***
- **Service Period Year***
- **ICD 10 Code:***

Home > Workload | help |

Work Item
 Work Item ID: 64560228 Work Item Type: Placement Start Date: 12/29/2014 End Date:

Add Monthly Summary

Provider Name: _____ Placements/Services: Level 2 Enhanced / Level 2 Enhanced Alcohol & Drug Treatment

Child Name: Ferguson, _____

Service Period Month*: June Service Period Year*: 2015

ICD Code*: Search

ICD Description:
 Narrative:
 Here is where you put the precise narrative for a Monthly Summary. Within this summary it is required to reference the ICD code. Program development staff will aid you with why/when/how/where to document. This is for demonstration only.
 I can leave my Monthly recording in this status "Draft" but realize the Agency CANNOT bill until the Monthly Summary is Completed.

Spell Check | Clear 11622

Status: Draft

Apply | Save | Cancel

Note: When a Monthly Summary is in a ‘Draft’ status, you can click **Apply** or **Save** and can return to the entry to add to it.

How to Retrieve Monthly Summaries

How to Retrieve a Monthly Summary via the Workload Page

UAT home | search | incident reporting | help & training | customer care | log off

Home | Case | Resource | Administration

Workload | Desktop | Calendar | Approvals | help |

Pierce, _____ Viewing for Pierce, Emily... 0 | Reassign | End

Type	ID	Name	Assignment Role
Ongoing Case	42900461		Private Provider Worker
Ongoing Case	2769817		Private Provider Worker
Ongoing Case	2911242		Private Provider Worker
Ongoing Case	2922148		Private Provider Worker

Select Recordings Case Status: Open Organization: Northeast Region
 Case Status Date: 08/05/2013

📄

- Utilize the icon as shown above to access a previously existing Monthly Summary.

How to Retrieve a Monthly Summary via a Search



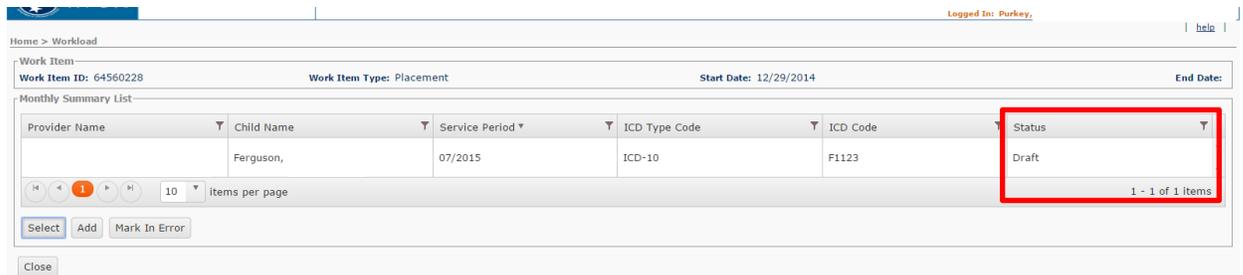
- You can also access an ***existing*** monthly summary by conducting a Person Search and navigating to the Person Overview page. By selecting the 'Monthly Summary' link you will be navigated to the "Monthly Summary List" page.

Note: You cannot create a new Monthly Summary from this link, but you can edit Monthly Summaries that are not in a Completed status.

Monthly Summary List Page

- A history of Monthly Summaries is displayed on the Monthly Summary List page.
- Monthly Summary records will only be saved as a Case Recording when they've been marked as 'Completed'

The screen shot below displays a Monthly Summary record in **"Draft"** status.

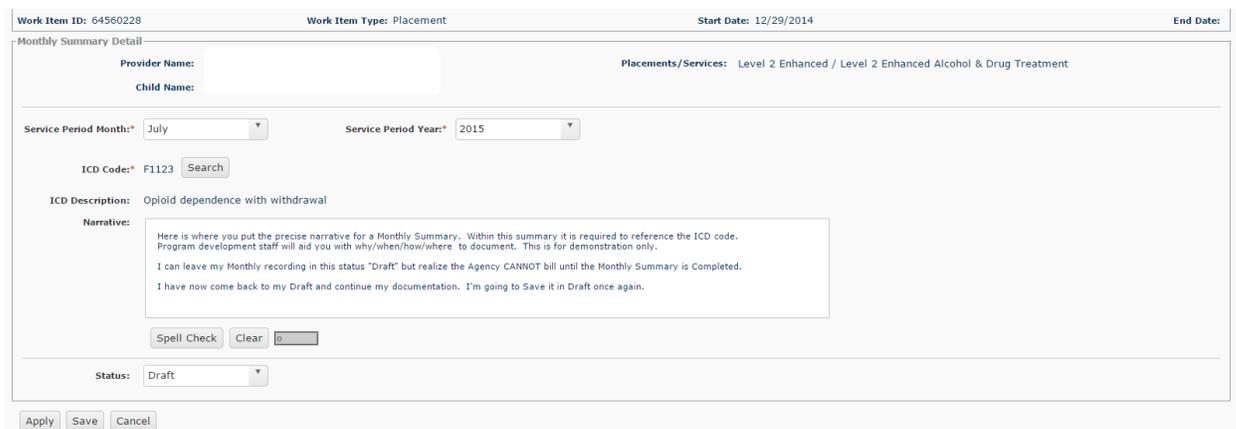


Making updates to a Monthly Summary in "Draft" status

- On the Monthly Summary List page, click on the Monthly Summary you wish to review or update, it will be highlighted orange
- Click **Select**

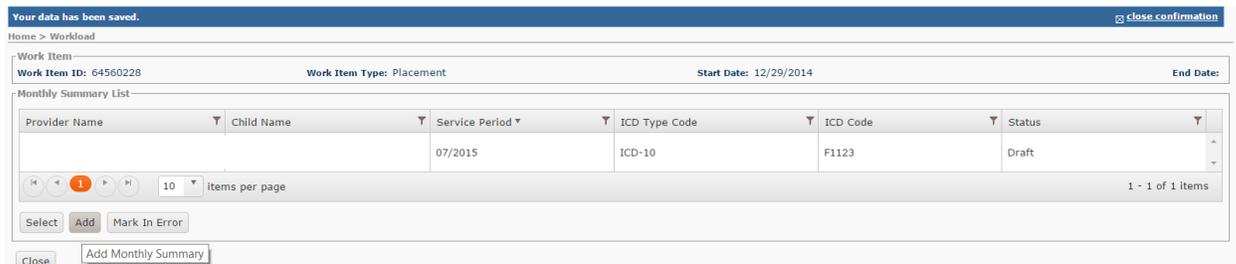


Note: The screen shot below displays the updated Monthly Summary record again saved in 'Draft' status.



Adding an additional Monthly Summary

- You can "Add" an additional Monthly Summary from this point even if you are not finished with the previous one. **Note:** Monthly Summary's will only be saved as a Case Recording when they've been marked as 'Completed'.
- Hover over the 'Add' button and the 'Add Monthly Summary' pop up label displays.



'Completed' Status

- Below is a screen shot of a Monthly Summary record that is in a 'Completed' status.

- Note that it is no longer editable.
- **Note:** The will now display in Case Recordings because it is marked “Completed.”

Your data has been saved. close confirmation

Home > Workload

Work Item ID: 64560228 Work Item Type: Placement Start Date: 12/29/2014 End Date:

Monthly Summary Detail

Provider Name: _____ Placements/Services: Level 2 Enhanced / Level 2 Enhanced Alcohol & Drug Treatment

Child Name: _____

Service Period Month: February Service Period Year: 2015

ICD Code: F11220

ICD Description: Opioid dependence with intoxication, uncomplicated

Narrative:

Status: Completed

Close

‘Created in Error’ Status

- If a Monthly Summary needs to be “Marked in Error”, click the “**Mark in Error**” button.
- Only Monthly Summaries in a ‘Completed’ status can set to a ‘Created in Error’ status.
- The error message displayed below is an indication to look at the Status column. Note that there are no Monthly Summary records that can be marked in error in this instance.

https://uat.tfacts.tn.gov/sacwis/WorkloadModify.do?command.do(monthlySummary)=1&eventId=4995801

UAT

home | search | incident reporting | help & training | customer care | log off

Home > Workload

Work Item ID: 64560228 Work Item Type: Placement Start Date: 12/29/2014 End Date:

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
		07/2015	ICD-10	F1123	Draft
		06/2015	ICD-10	F16959	Draft

10 items per page 1 - 2 of 2 items

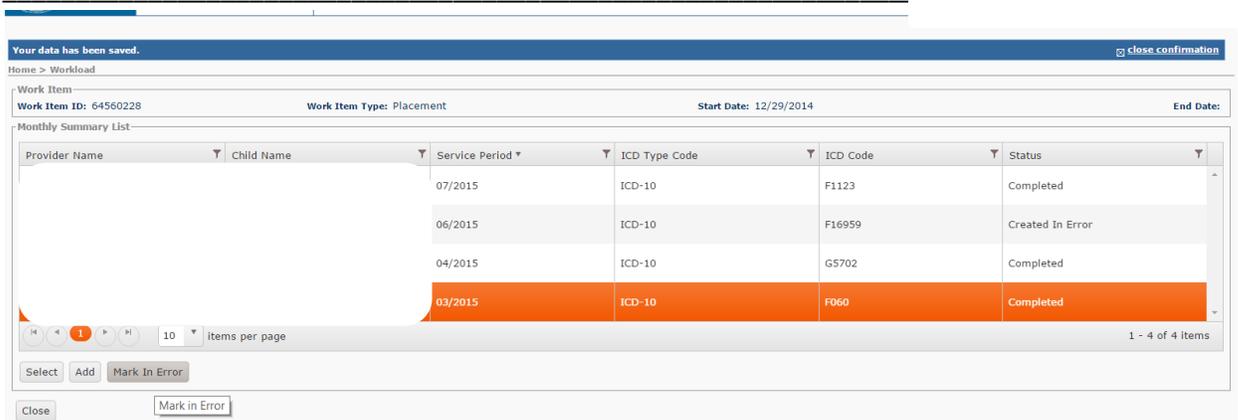
Select Add Mark In Error

Close

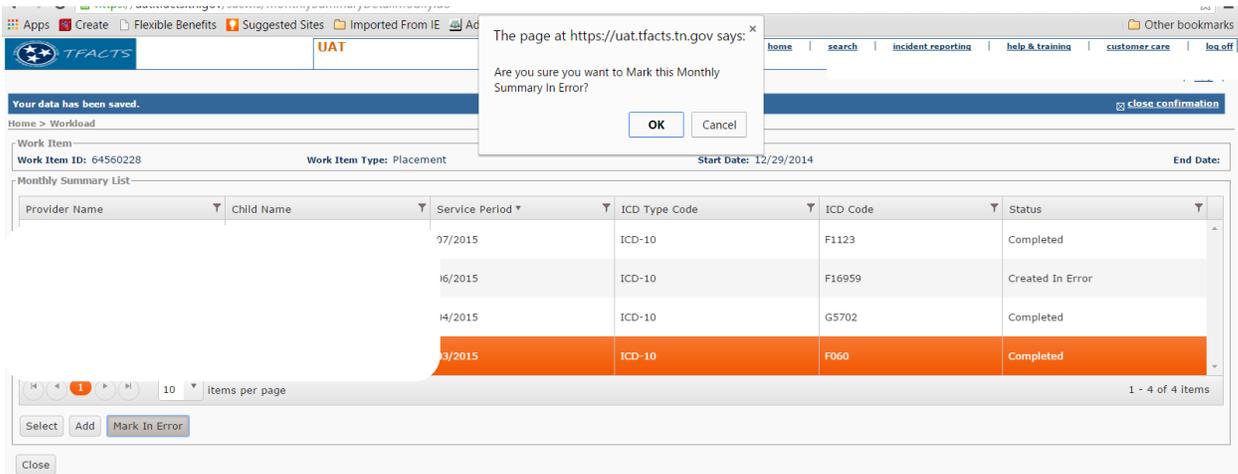
Note: Below there are now 3 Monthly Summary records in a ‘Completed’ status

- Always click on the row containing the Monthly Summary you want to “Mark in Error”
- If there are multiple Monthly Summary records that are in a ‘Completed’ status, the same pop up message as before will display. (**You have not selected a row to edit.**)

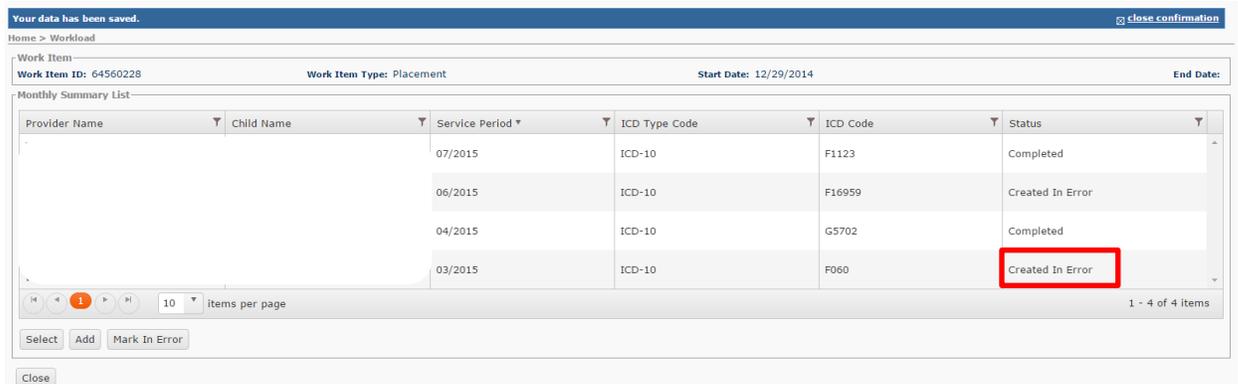
TFACTS Storyboard • Private Provider Monthly Summary entries, ICD-10



- When marking a Monthly Summary record in error, TFACTS will display a warning message stating, 'Are you sure you want to Mark this Monthly Summary in Error?'
- Click OK if you are sure you want to mark the Monthly Summary record in error. If not, click Cancel.



- Immediately upon clicking OK, TFACTS changes the status of the Monthly Summary record to 'Created in Error'



Entering a Monthly Summary for a child / youth when your assignment is ended

- Navigate to the Person Search page and enter search parameters
 - Enter the Person ID
 - Or
 - Enter the Last Name and First/Middle Name
- From the search results, click the **select** link to bring the child's / youth's Person Overview page into focus

Person Search

Person Search Criteria

Person ID: 106

OR

SSN:

OR

Reference Type:

Reference Number:

OR

Last Name: Pric

First/Middle Name:

Date of Birth:

Gender:

Race:

Advanced Search Criteria

Sort Results By:

Search Clear Form

Person Search Results

Result(s) 1 - 1 of 1

Person ID	Name	Address	Gender	DOB	% Match
106	Pric	19	Male		

select

- Click the **Monthly Summary Link**

Person Overview

Person ID: 106

Name: Pric

Address:

Phone/Contact:

Gender: Male

DOB: 01/18/2000

Age: 15 Yrs

Employee: No

Person Details

Person Profile

Education

Health

Financial

Assessment History

Person Characteristics

Legal History

TFACTS History

Relationship History

Monthly Summary

Close

- Select the Monthly Summary you want to edit or view
- Click Select to bring your selection into focus

Person Overview

Person Header

Name: Pric

Person ID: 106

Gender: Male

SSN:

DOB: 01/18/2000

Age: 15 Yrs

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Pric	Pric	08/2015	ICD-9	3099	Narrative Needed
Pric	Pric	07/2015	ICD-9	3099	Completed

10 Items per page

1 - 2 of 2 Items

Select Mark In Error

Close

Continue to next sub topic

- Enter the Narrative
- Change the Status to Completed
- Click Save

Person Header

Name: [Redacted] Gender: Male DOB: 01/18/2000
 Person ID: 10601700 SSN: [Redacted] Age: 15 Yrs

Monthly Summary Detail

Provider Name: [Redacted] Placements/Services: Level 3 Enhanced / Level 3 Enhanced Sex Offender Treatment
 Child Name: [Redacted]

Service Period Month: August Service Period Year: 2015

ICD Code: 3099
 ICD Description: Default ICD-9 Code for TennCare

Narrative: test

Spell Check Clear 31998

Status: Completed

Apply Save Cancel

The status of the Monthly Summary now displays as 'Completed'.

Person Header

Name: Pr [Redacted] Gender: Male DOB: 01/18/2000
 Person ID: 1([Redacted] SSN: [Redacted] Age: 15 Yrs

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
		08/2015	ICD-9	3099	Completed
		07/2015	ICD-9	3099	Completed

10 items per page 1 - 2 of 2 items

Select

Close

You have completed this storyboard.